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ABSTRACT

Summarizing three different perspectives on lifelong learning in America, these three conference papers each reflect the orientation of a particular group of individuals involved in a particular project or study. Charles I. Bunting reflects the concerns of the Department of Health, Education, and Welfare as presented in its first report on lifelong learning to Congress. He notes that the Lifelong Learning Act ("Mondale Bill") part of the Education Amendments of 1976 authorized support of three general activities: research and analysis, demonstration and dissemination, and state-level efforts. He summarizes what the legislation sought to convey about lifelong learning and how the project interpreted its charge and established an agenda and recommendations for its report. Rexford Moon's paper describes the context and intent of a new project of the College Entrance Examination Board that will offer new services to adult learners and institutions. Included is review of a study on characteristics of adults in career transition and an overview, Future Directions for a Learning Society, which focuses on educational and career planning information, assessment of learning, fostering of public awareness, new arrangements for credentialing and certification, and institutional program planning and development. The third paper, by Richard E. Peterson, is based on experience in the Educational Testing Service project sponsored by the Exxon Foundation. Nine "important next steps" are suggested to move lifelong learning from rhetoric toward reality. (JT)

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CURRENT ISSUES in Higher Education

NEXT STEPS TOWARD LIFELONG LEARNING: VIEWS FROM THREE NATIONAL PROJECTS

Charles I. Bunting
Rexford Moon
Richard E. Peterson

CE 018 110

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FOREWORD

George J. Nolfi

The following three papers summarize three different perspectives on lifelong learning in America. They each reflect the orientation of a particular group of individuals involved in a particular "project" or "study." Richard Peterson's paper addresses as a set of selected issues of concern to planners; Charles Bunting's reflects the concerns of the Department of Health, Education and Welfare, as presented in its first report on lifelong learning to the Congress; and Rexford Moon's paper describes the context and intent of a new project of the College Entrance Examination Board that will offer new services to adult learners and institutions. Although the three papers derive similar conclusions on some matters, they also reveal some subtle differences of opinion about the current status and future potential of adult learning in America.

The unifying theme of the papers, "Next Steps Toward Lifelong Learning," suggests the question, for what purpose and to what end? To meaningfully interpret the implications of these papers, it is essential to formulate a set of questions that readers can apply to each paper as they read it. I contend there are five critical questions about the future of lifelong learning in America that must be addressed by any "next steps." These questions address the basic, unavoidable choices and decisions that will come to the fore as the lifelong learning movement grows.

(1) *The first question is, Who will be served?* All the present data confirms that the existing pattern of lifelong learning in America is such that the learning needs of adults at the upper end of the income, previous educational attainment, and job-status scales are reasonably well met, whereas the needs of adults at the lower end of those scales are, typically, not met adequately.[1] The gap between adults' expressed desire to participate in continuing education opportunities and activities and their actual participation rates is largest for those who have the least income and the lowest previous educational attainment and job status/career mobility.

Hence the "system," as it now operates (not by design, but as the result of historical circumstance), is acting to widen the gap between those who are better off and those who are less well off. This situation is contrary to the objectives of much of this nation's social and educational policy.

What will the "next steps" recommended by each author do to rectify this problem? I contend that the most crucial next step in American lifelong learning must be to expand access to learning opportunities for the millions of "bypassed" adults—of lower income, previous educational attainment and job status/career mobility—who clearly want learning opportunities they are not now receiving.

(2) *The second key question is, What specific next steps justify public investment?*[1] *And more broadly, Who should pay for which next steps?*

The vast adult-learning enterprise in America has grown largely without public policy or investment. It is almost totally financed by the private payments of users or third-party payers/users (e.g. employers). It has grown because a need and a market[3] existed for a range of learning opportunities, and a vast array of providers responded with offerings of nearly infinite variety.

What does each author suggest are the most important next steps, and what does each say about who should pay for them? How does each one justify the public investment role, if and when they recommend it? I contend that public investment should be made in a highly selective fashion and should be focused on those clienteles and activities in lifelong learning (a) where consumers cannot bear the cost themselves, and (b) where clear social benefits as well as individual benefits can be discerned.

(3) *The third question is, What services should be provided?* Far more potential services could be provided than can be paid for with public expenditures. Furthermore, different services will attract different clienteles, and the choice of which services to recommend as next steps has profound financing and access implications.

For example, it is generally acknowledged that more information, referral, and counseling services for adult learners are needed. But what services should be provided? At what locations or sites? At what cost, and to whom? Under which organizations? And with what kinds of staffing/technology/mediation, etc.?[2]

The authors' response to the basic question of what services are needed should be examined in this light. My own view is that the expansion of instructional services and options for selected social-

priority clienteles should be encouraged by a voucher subsidy payable directly to those clienteles, and non-instructional learning-support services should be expanded by providing free information, counselling, advisement, and referral services through the public library system and through those community agencies that are located in and serve communities of disadvantaged persons.

(4) *The fourth question is, What mix of providers will supply the range of learning opportunities?* The present array includes private, public, and proprietary educational institutions, public schools, community agencies and organizations, employers, unions, professional associations, the military, libraries, and a variety of other groups and organizations.[3] Any statement about what services should be made available should provoke the reader to question *who* is to provide these services.

Which providers does each author conclude should take which of the "most important next steps"? My own view is that the marketplace character of lifelong learning in America should be encouraged, and that we should adopt "a consumers point of view" when considering providers—that is, that a reasonable amount of healthy competition between different providers, each seeking to meet a certain need in its own way, is desirable and will result in a more responsive overall system.

(5) *The fifth question is, What innovations are likely to and should take root?* Should our next steps emphasize mediated forms of learning, or should they involve traditional teaching-learning formats delivered in non-traditional settings (such as the workplace at noon)—or is one of a myriad of other possible innovations better?

One cannot define the important next steps adequately without specifying what innovations should be fostered, and why. My own view is that many adults want traditional teaching-learning formats offered at more convenient times and places (survey data supports this), and that much can be accomplished by simply figuring our adjustments in where and when we should deliver what is now delivered. More dramatic teaching-learning mode innovations should not be discounted, but much can be done by more creatively using the resources, programs, modes, etc. we already have.

What the five major questions presented above provide is a conceptual framework, or grid, for the reader to apply to the process of deciding what the most important next steps in lifelong learning in America should be. The reader can (a) draw his or her own conclusions by thinking through these questions, (b) apply the grid to the papers that follow and compare and contrast what each author says or does not say, and (c) respond to my own views, as presented in response to each question above.

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FOOTNOTES

[1]George J. Nolfi, "The Case for Selective Entitlement Vouchers", *Current Issues in Higher Education* (San Francisco: Jossey-Bass, 1976), p. 130.

[2]George J. Nolfi, *Adult Open Learning: Federal Investment in Research and Experimentation*, a study prepared for National Institute of Education, University Consultants, Inc., Cambridge, Mass., 1975.

[3]George J. Nolfi, *The Lifelong Learning Marketplace*, a study prepared for the Lifelong Learning Project, Department of Health, Education, and Welfare, University Consultants, Inc., Cambridge, Mass., 1977.

[4]See, for example, George J. Nolfi, *The Massachusetts Educational Linkage Service: Serving Academic Institutions, Proprietary Schools, Employer Education Programs and Union Education Programs*, project funded by the Fund for the Improvement of Postsecondary Education, U.S. Department of Health, Education and Welfare, University Consultants, Inc., Cambridge, Mass., 1976.

I. THE FEDERAL LIFELONG LEARNING PROJECT

Charles I. Bunting

Because a major milestone of the current Federal activity under the lifelong learning banner was reached only recently (February 1978), I will devote a portion of my remarks to straight reporting of events as they are unfolding in Washington, DC.

I will also share some views, often personal, on the concept of lifelong learning and its relationship to governmental responsibilities, especially at the Federal level.*

BACKGROUND

The Lifelong Learning Act was authored and championed by then-Senator Walter Mondale, and it became law in October, 1976 as part of the Education Amendments of 1976.

In brief, the "Mondale Bill" discussed the background and meaning of the lifelong learning concept, located the Federal leadership role in the Office of the Assistant Secretary for Education, and authorized support for three general activities: (1)research and analysis; (2)demonstration and dissemination; and (3)state-level efforts. It paid considerable attention to the need for increased coordination among programs and activities across the Federal government and required that reports be submitted annually to the President and Congress.

The Act became law in October, 1976, shortly before the national election. During the next eight months, relatively little was accomplished—the government was in a state of transition, no funds were requested or appropriated for lifelong learning in its first year of eligibility, and there was some degree of minor bureaucratic warfare over the program's initial thrust and sponsorship.

One might say that the Lifelong Learning Project really got underway in July of 1977, when a small and temporary, but distinguished staff was assembled. Initial priorities were thrashed out, and 34 small contracts for relevant papers were awarded, with modest funds donated by the education agencies.

During the fall of 1977, the Project's staff began shaping the outlines of the first annual report, reviewed initial drafts of papers being prepared in the field, and sponsored several informal "hearings" with interested individuals and groups in Washington and elsewhere. Their report, entitled *Lifelong Learning and Public Policy*,[1] was submitted on February 15, 1978. Somewhat ironically, the Vice President received a letter saying, "Dear Mr. Mondale, find enclosed a copy of the Report on the Mondale Bill. . . ."

The following is a summary of what the legislation sought to convey about the concept of lifelong learning and how the Project interpreted its charge and established an agenda and recommendations for its report.

In September, 1976, a survey of international efforts in "lifelong education" issued by the United Nations Educational, Scientific, and Cultural Organization (UNESCO) drew the following heady conclusions:

> . . . a number of misunderstandings have been cleared up. Lifelong education has gradually ceased to be confused with adult education or recurrent education, or with a kind of limitless extension of schooling . . . it puts an end to the dualism between school and out-of-school education as it does, moreover, between education and life—that it is, in fact, a source of coherence and integration.[1]

This optimistic report may not have reached Capitol Hill in time. At least, those looking for precision and tidiness will not find it in the language of the Lifelong Learning Act. I quote from the preamble:[2]

> Lifelong learning includes, but is not limited to, adult basic education, continuing education, independent study, agricultural education, business education and labor education, occupational education, preretirement and education for older and retired people, remedial education, special educa-

*Charles I. Bunting, Deputy Director of the Fund for the Improvement of Postsecondary Education, is Acting Director of the Lifelong Learning Project.

tional programs for groups or for individuals with special needs, and also educational activities designed to upgrade occupational and professional skills, to assist business, public agencies, and other organizations in the use or innovation and research results, and to serve family needs and personal development.

This is not a description of the typical, categorical, educational program; despite the early identification with older adults, a lifelong, or "cradle to grave" concept is clearly being forwarded. It is evident also from this passage that lifelong learning was intended to include both nonformal *and* formal kinds of educational services, institutions and programs.

In the Project's initial days, I think others shared my own discomfort with the breadth and diffuseness of this inclusive definition. As our work proceeded, my discomfort increased as it became clear that different people espouse different, and sometimes conflicting, ideas about the meaning of lifelong learning. The lifelong learning concept is variously interpreted as a rationale for expanding existing college and school programs serving particular clienteles, or alternatively for legitimizing out-of-school, informal forms of education; as a way of addressing adult needs, or the spectrum of needs from youth to old age; as a legitimation of current services; or as a promise for reforming the system. It has also been taken as a synonym for the best in vocational training, community building, literacy instruction, recreation and individual enrichment activities.

My initial discomfort with this range of interpretations relaxed somewhat as I came to view lifelong learning less as a particular thing or discrete program, and more as a battleflag—a banner under which many ideas, groups, and individuals can come together, reflecting different causes and interests, but also sharing certain convictions and common bonds. The Lifelong Learning Project report attempts to explore some of these philosophical and practical bonds and to reflect on present and future governmental roles related to them.

We are not starting with a particular program or course of study, but with a perspective. The legislative title, "Lifelong Learning," provides initial cues about this perspective. It refers to *learning*, not education; and it is about individual *learners*, not programs, schools, or institutions. In the report, "lifelong learning" is taken to refer to the process by which, in schools and out of school, individuals continue to develop knowledge, skills, and attitudes over their lifetimes. "Learning opportunities" are understood as activities or programs through which such learning is nurtured. From this perspective, one might depict an ideal model with three components: *individuals* successfully guiding and fostering their own development and growth; local *providers* offering (often on a collective basis) learning resources to these individuals; and public *policies* directed toward encouraging both individual growth and enriched learning opportunities.

The Lifelong Learning Project and report attempted to sketch out and be true to this general perspective, but did not attempt to do justice to the staggering array of tasks and topics included in the legislation. Three emphases that we agreed on for the report are worth noting. First, we limit our attention largely to *adult* learners. Second, we organize our total effort around particular *learner groups*, or more precisely, subgroups—of women, workers, older adults and urban, unemployed younger adults—who are now inadequately served by the system. And third, we take as our particular responsibility a focus on the *Federal role* in lifelong learning.

The report itself is organized in two general sections. The first includes case studies of the four learner-groups, which attempt to analyze their needs from a lifelong learning perspective and to recommend policies that might be adopted to meet some of those needs. Most of the 34 papers developed in the field as a part of the Project analyze these needs and policies in greater detail.*

The second part of the report, which will receive greater elaboration here, addresses the governmental role in lifelong learning, particularly at the Federal level. In general, the report takes a very cautious stance toward expansion of governmental roles. To borrow a concept from another context, the report generally conceives the educational domain as a local *function*, frequently a state *responsibility*, but limited to a Federal *concern*.

Our initial recommendations reflect this cautious view, but attempt to be true to what we understand as the unusual character of the legislation: that it does more than authorize a program of grants and contracts; that a particular *perspective* or point of view is conveyed, which the government is urged to turn on *itself* to enhance the lifelong-learning orientation of its *own* activities.

*These papers will be available in September, 1978. Inquiries should be addressed to the Office of the Assistant Secretary of Education, DHEW.

Initial recommendations include three general activities: program analysis and coordination efforts at Federal and state levels; basic and applied research inquiry into long-neglected issues; and the demonstration and dissemination of effective services provided to clients at local levels.

THE FEDERAL ROLE IN LIFELONG LEARNING

I would like to convey some of my views on the emerging broader themes suggested by the lifelong learning topic and their practical consequences for activities at the Federal level. Some remarks parallel the report; others are perhaps more personal.

I mentioned the apparent conflict among groups with different perspectives on lifelong learning. These groups often simultaneously accused the Project of adopting a posture that was unfairly "pro" or "anti" formal schooling. But there can be no such dichotomy in lifelong learning, particularly when the focus is on adult learners.

In my view, when one examines the learning opportunities available to adults, two basic conditions emerge. First, the formal system of education was established for *youth*, not for adults. And second, perhaps in part as a consequence, adults have historically sought and successfully obtained many learning services or resources *outside* schools, in the broader community. These two conditions also suggest avenues for useful inquiry and activity in *both* sectors—the formal and the nonformal. How one views these conditions will also affect one's view of the current Federal role in education and of future Federal activities. Taken together, the directions are different but not conflicting; complementary but not incompatible.

First, given the historical reality of the youth orientation of schooling, the existing values, policies, and practices of institutions, *and* the governmental programs that support them need to be examined closely to determine if adults are served *equitably* or *effectively* by those policies and practices. Such an examination would also serve to determine if the broader range of *providers* of services to adult learners have a fair opportunity to receive government support.

These questions of *equity* and *responsiveness*, particularly in the traditional sector, provide the base for an important part of the analysis and coordination role of the Federal government, from a lifelong learning perspective. Is there a justification for excluding less-than-half-time learners (most often adults) from participation in student-aid programs? Is there a justification for limiting eligibility in discretionary grant programs to accredited colleges and universities or public schools, when many other agents in society are providing similar services? Is there a need for greater support for the development of effective models to increase the responsiveness of institutions' programs and services for older learners?

Second, the extent of *adult learning occurring outside formal schooling* also brings to the fore the question of equitable treatment for non-institutional providers of services under federal program guidelines. It also highlights the need for research and inquiry into the *way* people learn outside of schools—what, where, and perhaps especially, how. Such an examination might benefit schools themselves by clarifying what particular educational purposes are best served by formal schooling. Third, it points to the need for greater awareness and legitimation of this broader sector of learning—and a valuable role for the government to play in demonstrating and disseminating cost-effective services for local communities. Indeed, I take one of the purposes of the legislation itself to have been educational: after decades of intensified expansion of the formal educational sector, lifelong learning is offered as a vehicle to remind us of the broader context of our lives and our society, within which our schools function. As Larry Cremin has pointed out, the significance of recent research into the effects of early schooling may be not that schooling has had more limited impact than was previously imagined, but that other institutions and forces in society have had much *greater* educational and developmental impact than expected.[3]

The function of coordination within the government receives much emphasis in the lifelong learning legislation. Since efforts to coordinate anything in Washington generally fail, I would hope that in the pursuit of lifelong learning purposes, there be no effort toward interagency coordination separate from a *particular* idea for improved service for learners—whether that be to add educational components to youth employment programs at the Department of Labor, to sponsor educational approaches to family nutrition with the Department of Agriculture, or to demonstrate the role of local fire departments in providing safety training in local communities with the Department of Commerce. Establishment of typical bureaucratic coordination mechanisms in

search of a useful mission would paralyze the initiative before it even began.

Second, the character of any future Federal program should be molded with great precision to preserve the unique potential of the legislation. For example, if funds are appropriated, the program should provide direct assistance, but not stake out its own territory, as is the custom in bureaucracy. If my program, the Fund for the Improvement of Postsecondary Education, were to provide less support for important activities beyond the collegiate sector, or for improved college services for adults, then any future lifelong learning program could be considered a failure; if the Fund's commitment in these directions were to increase, then such a program might be judged successful. This is just one of several ways in which lifelong learning must evolve if it is not to become "just another Federal program."

Finally, whatever the outcome of the Administration's current effort to obtain an initial appropriation for lifelong learning, I would hope that the legislation's requirement that annual reports be prepared and submitted be taken seriously. This first report was just a beginning. Many useful issues and concerns identified in the legislation were intentionally put aside: for example, the relevance of European and other international lifelong learning models for the United States; the future shape of proposed "systemic" changes, such as entitlement and voucher plans—or tax credits, for that matter; and the reassessment of proposals for regional examining universities and other alternatives to the current job-certification function of schooling. But equal to the value of exploring such specific concerns might be the actual practice of a small corner of the government seeking to contribute usefully on a continual basis to dialogues about the role of education and learning in our society.

I close with one last quote from the 1976 UNESCO report:

> ". . . lifelong education, no longer confused with one or another of its components, has ceased to be regarded as one of those forms of education which, following the educational fashion of the day, are launched on the market from time to time as a magic formula capable of solving all the difficulties encountered by previous systems.[4]

To this sentiment, one can only add "Amen" and the hope that its authors are not also premature in drawing this conclusion.

FOOTNOTES

[1] *Results of Completed Studies and Projects Undertaken by UNESCO in the Domain of Lifelong Education.* UNESCO General Conference, Nineteenth Session, Nairobi, Kenya; 1976.
[2] *Lifelong Learning and Public Policy.* Lifelong Learning Project, U.S. Department of Health, Education and Welfare. Washington, D.C.: U.S. Government Printing Office, 1976.
[3] Cremin, Lawrence A. *Public Education.* New York: Basic Books, 1976.
[4] Op. Cit., UNESCO 1976.

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II. THE COLLEGE BOARD PROGRAM

Rexford G. Moon, Jr.

At the same time that planners and policymakers around the nation are being informed and warned about "future shock" and the emerging "age of discontinuity," an increasing number of adults in America are experiencing "shock" and "discontinuity" in their daily lives. Rapid and often unpredictable social and economic occurrences (along with the simple fact of aging) are forcing Americans to seek change—in job, in lifestyle, in where they live, and in their values. Many people find this imperative to change makes demands that are beyond their ability to cope. These are Americans in transition—many of them in career transition—and their number is legion.

CHARACTERISTICS OF ADULTS IN CAREER TRANSITION

The College Board recently asked a representative sample of the nation's 120,000,000 adults between the ages of 16 and 65 if they considered themselves to be in some stage of career transition or job change. We received a resounding "yes" from 36 percent. In other words, right now over 40,000,000 Americans say that they are or expect to be in a career transition.

Our study also revealed, through structured interviews, that:[1]

(1) *Adults in transition are predominantly female, white, and between 20 and 39 years of age.* They are typically, married, with one to three children living in the household. They have family incomes of $10,000 a year or more, with females having lower incomes than males and blacks lower incomes than whites. While both males and females contribute earnings to their family incomes, men are the principal wage earners, while women earn money to supplement the family income.

(2) *In-transition adults are a diverse group in terms of educational attainment.* Half have completed some postsecondary schooling—primarily at four-year colleges and universities—and were primarily attracted by professional programs, typically in business or education. Males are better educated than females and whites better educated than blacks. For the most part, those who attended postsecondary institutions hold some type of degree, certificate, or license. About half completed their schooling within the past ten years.

(3) *The majority of in-transition adults are employed full time at semiskilled or unskilled jobs, with males more likely to be employed than females.* They have held those jobs for three years or less, having worked at only one additional full-time job in the past five years. They are currently earning between $5,000 and $14,999 at their jobs, with males earning more than females. Those who are currently unemployed are primarily homemakers who withdrew from the work force due to childcare or homemaker responsibilities. Unemployed adults have been out of the labor force for four or fewer years, though typically they have looked for work within the past two years.

(4) *Most adults in transition are presently employed and wish to either change fields or to change their level or status in their present fields.* Financial need is the prime motivating force, though a desire to seek more interesting work and to advance professionally are also considerations. Most adults anticipate some problems in making these changes, such as the unavailability of jobs and their own lack of experience or credentials. Half of the adults have begun to take transition steps, with educational enrollment and the filing of job applications constituting the most commonly taken actions. They aspire to professional or skilled positions, which they have learned of primarily through their previous work experience.

(5) *Most in-transition adults (60 percent) plan to seek additional education in order to gain credentials for entry into new fields or to promote advancement in present fields. They are interested in professional programs or vocational, trade, or technical programs offered at four-year colleges/universities or vocational/technical schools.*

(6) *Adults in transition want career services of all types. However, they are most interested in information services, particularly specific information on jobs, careers, or educational opportunities. Of all adults, the least educated (12th grade and less) are those expressing the greatest interest in services.* As age increases, interest in services decreases. Adults are willing to pay for services and would spend money this year to have them.

(7) *Most in-transition adults do not know about agencies offering job or career help in their communities.* Those who are aware of such agencies, however, are primarily aware of college or university placement or counseling centers and state employment services. Lists of jobs and job-skills training are the types of services that adults perceive as being available to them. A knowledge of local agencies offering career services does not necessarily lead to use of such services; there is about a 50-50 chance that a known agency will be used. Adults who do use available services are satisfied with the help they have received. Reasons for not using local services are varied; some adults feel these services are inappropriate to their needs, while other adults are just not interested in or ready for help. Adults find out about these services through family members or friends, schools or training institutions, and television or other public media.

(8) *Adults in transition view all methods and ways of receiving services as being basically acceptable. However, they prefer one-to-one sessions with an advisor, counselor, or other experienced professional to either group sessions or to some form of self-instruction.* Adults find printed materials, formal courses, work-experience programs and direct observation of workers as being more acceptable than less traditional and more technologically sophisticated methods involving such things as computers and mass-media techniques.

(9) *The ideal career center would offer services at a local school or college on weekday evenings.* It would inform adults of the availability of those services through mailings to households in the community. Problems that might prevent adults from using those services would be time and money.

(10) *With the exception of age, in-transition and not-in-transition adults have very similar personal characteristics.* Not-in-transition adults are older than in-transition adults; typically, they are over the age of 40 and very likely to be at least 50 years of age. Though they do not anticipate making job or career changes, not-in-transition adults do express some degree of interest in career services and would pay for the services that interest them. However, the level of interest in career services expressed by adults not in transition is much less than that expressed by adults in transition.

The state of being in transition (be it career, family, civic, or cultural transition) is what motivates adults to seek learning, whether in a dependent or independent mode. Simply stated, "life transitions"—which, according to a recent report by the Academy for Educational Development, have "certain common characteristics such as learning new roles and relinquishing old ones"—are the *driving force behind a learning society.* The incentive to change is driven by the following: a change in status (or role) requires a change in knowledge, skills, attitudes, or values; a change in these often requires new learning; new learning requires self-directed study or formal instruction; and the particular circumstances of the adult in transition determine the type of study or instruction he or she can or will undertake.

Unfortunately, we know surprisingly little about lives in transition generally, or about the patterns of transition throughout the lives of individuals (except that they differ). We have not developed very good ways of helping people diagnose the transitions they are in; we have not done a good job of figuring out how learning can be supportive of smooth transitions; and we do not know very much at all about how to help adults use learning independent of a formal structure to effect smooth transitions.

I think we may assume that if we could penetrate these mysteries, we would do a much better job of aiding learners and furthering lifelong learning in America.

MEETING THE NEEDS OF LEARNERS: COLLEGE BOARD EFFORTS

To be effective, accepted, and useful, learning programs and services targeted for adults must deal with the transition needs of the individual, not with arbitrarily defined conditions in the learning society; i.e., what institutions think people want. For example, if adult literacy is the challenge (which it is), then remediation efforts must be tailored to fit the transition needs of the individual learner—which need may not always be perceived. The absence of literacy is not a transition state and is not likely to produce much incentive for learning; this fact has been well-substantiated by data on the lack of participation and retention in programs of adult basic education.

At the College Board, we have always been concerned about matters of learner access and transition. We have dealt with these matters successfully within the context of the traditional system of education. Some years ago, we recognized that in dealing with the *adult learner,* we must be concerned with access and transition in a much larger social context—not just within the boundaries

of an established structure and system of higher education institutions.

Recent Programs and Services

In the past decade, the programs and services that have evolved from the Board have contributed significantly to developing diverse learning arrangements for adults in America. Some *examples* of these efforts include:

(1) *The College Level Examination Program* (CLEP), which, along with the Advanced Placement Program, *pioneered* the idea that learning can be measured and credited even if it doesn't take place in a classroom.

(2) *The Commission on Non-Traditional Study* which, with the Educational Testing Service (ETS), opened up many new approaches to learning opportunities, including the Council for the Advancement of Experiential Learning (CAEL), and supported the early research of Richard Peterson, the advances of the American Council on Education (ACE), Continuing Education Unit (CEU) competency instruction; and the development of the educational information center idea.

(3) *The Office of New Degree Programs* which, with ETS, served the needs of many institutions that wished to start nontraditional study efforts of all kinds.

(4) *The Library Project,* which provided the ground work for the development of the public library as a comprehensive support service for independent learners in pursuit of their individual learning projects.

(5) *The Decision-Making Program,* which provided workshops and materials on decision-making to help adults plan their life-goals and foster their further learning.

(6) *Bridging the Gap,* a series of studies on education and work linkages, and other studies of state needs assessment which, since the early 1970's, have resulted in a great many major studies.

(7) And most recently, the *Career-Skills Assessment Program,* which helps high-school students and younger adults to assess their readiness for career decisions and to take action toward a career commitment.

Future Directions for a Learning Society

Working on the transition and learning needs of adults is a much tougher assignment for all of us, regardless of our orientation, once we get outside of our familiar systems and structures. For example, at the College Board we are working on these challenges through a program, now in its formative stages, called *Future Directions for a Learning Society.* The priorities we have identified for a learning society that we think we at the College Board can work on under the leadership of this new program are these:

- Better definitions of social and demographic conditions that influence adult learning
- Increased equity for all learners
- Public policies that are supportive of adult learners
- Better information services for prospective learners
- Improved training for managers, planners, policy-makers, counselors, and faculty
- Better descriptions of and research on learner needs, lifelong learning behavior, and the needs of target groups
- Increased support for the independent, self-directed learner
- More collaboration between all providers of learning environments—education, work, cultural institutions, media, and the military
- New methods of learning assessment and certification
- Better linkages between learners and the broad array of learning opportunities
- More effective coordination of resources, both public and private
- New definitions of the mission, role, and forms of institutional organization

In a global sense, developing public and private initiatives to address these priorities are the most important next steps toward a learning society.

Future Directions for a Learning Society (FDLS) focuses on serving the access and transition needs of adult learners and assisting the diverse agencies, institutions, and organizations that provide learning opportunities. Funded by a grant from the Exxon Education Foundation—for management and planning, for the identification and design of service areas, for review and analysis of public policy and for selected publications—this program seeks consensus and support for strategies, services, and policies that can best meet current and projected needs of both participants and providers in a learning society. To this end, the program actively solicits, and relies on, the participation of professionals, public policy-makers, and the community at large. Our role is as a catalyst for new resources and new directions. Overall, Future Directions for a Learning Society emphasizes improved assessment of learner needs and provider needs, better support services for all learners to guide their planning and selection of learning opportunities, and better delivery of learning opportunities by institutional and community-based providers. Service areas of special interest to FDLS include educational and career-planning information, assessment of learning, new programs to foster public awareness, new arrangements for credentialing and certification, and institutional program planning and development. The program is charged with designing activities and carrying out demonstrations in these areas. Furthermore, FDLS will support public policy analysis and development as a critical and necessary component for effecting solutions to the access and transition needs through legislative and regulatory alternatives.

As a program activity of the College Board, our program has service as its "bottom line." We are not a research and study effort (though we will do some research and will identify areas where further research is needed). We are not a commission for study, reflection, and contemplation (though we respect and use the findings of our own Commission on Non-Traditional Study, the Carnegie Commission, and others). We have taken a *pro-action* posture and are now generating activities, demonstrations, and services on our own and in *cooperation and collaboration* with others, to help adults and providers address the problems of access and transition and to help institutions and other providers improve their services to learners.

The basic design of this new program places emphasis for action in the highly interrelated areas of access and transition, learning and needs assessment, organizational change and development, and public policy and public information. Our activities are in various stages of development; some are yet to be identified and designed. We believe that these new efforts will provide not only answers but solutions to problems.

Current Initiatives

At the The College Board, we are now engaged in or are in the advanced stages of planning the following activities:

(1) A National Forum on Learning and the American Future, with a panel of more than 3,000 decision-makers.

(2) A new nationwide study on adults in different types of transitions: career, family, leisure, citizenship, aesthetic, and ethnic.

(3) A series of studies of innovative practices being used by institutions, businesses and unions, libraries, and other providers to serve adult learners.

(4) Studies of the future needs and planned initiatives of publishers and the media to reach adult learners.

(5) A continuing set of national conferences with ECS, the National Center for Educational Brokering (NCEB), and the Institute for Educational Leadership (IEL) on developing and operating educational informational systems and educational information centers.

(6) A series of conferences on addressing research needs in lifelong learning, growing out of the *Agenda on Research Needs in Lifelong Learning*, which we will publish shortly.

(7) A set of national and regional dialogues on future contractual relations between higher education and the corporate world.

(8) Demonstration of an information center and clearinghouse on the assessment of adult learning.

(9) Demonstration in various types of institutional settings of career information centers for adults.

(10) Demonstration of the training and use of "study organizers" in industrial settings.

(11) Demonstration of community/learner needs-assessment techniques and related requirements of organizational analysis and change.

(12) Demonstration of a comprehensive program of public information for adults, including a newspaper for adults; a possible newspaper column; public service announcements; learning fairs for adults; and financial aid information.

(13) Demonstration of new instrument for learners self-assessment and goal setting for adults.

(14) Demonstration of learner-assessment centers related to institutions, industry, and other providers.

(15) Development and operation of a National Leadership Institute in Lifelong Learning Management.

CONCLUSION

I believe we are in for exciting and demanding times as we move forward in America to create our own learning society. Our learning society is bound to be built on a very firm foundation of institutions of all kinds, regardless of the labels we put on them, because as a nation we have made heavy investments in our educational institutions and agencies. We have, by design, created a great diversity of such institutions (including postsecondary institutions, libraries, museums, and others); and we are beginning to realize that these institutions can offer the diverse mix of learning programs, learning activities, and learning services that most Americans in transition need. Helping all Americans in transition through education and learning services is the challenge and the opportunity in front of us. Service to the lifelong learner is the "coming of age" of our educational system in America.

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FOOTNOTES

[1]Solomon Arbeiter and Carol B. Aslanian, *40,000,000 Americans in Career Transition* (New York, New York: The College Board, 1978).

[2]Howard Spierer, *Major Transitions in the Human Life Cycle: A Summary of a Conference on the Significance of the Biomedical and Social Sciences in Understanding the Aging Process* (New York: Academy for Educational Development, 1977).

III. THE EDUCATIONAL TESTING SERVICE PROJECT

Richard E. Peterson

INTRODUCTION

During the past year I have been director of a lifelong learning project, funded by the Exxon Education Foundation. Our January (1978) project report, tentatively titled *Toward Lifelong Learning in America: A Sourcebook for Planners,*[1] is briefly described below to provide a context for my thoughts on the most important next steps for lifelong learning in America.

In the preface to the report, a definition of lifelong learning is offered in the form of a general proposition, along with eight priority goals. The proposition reads as follows: "Lifelong learning is a conceptual framework for conceiving, planning, coordinating, and implementing activities designed to facilitate learning by all Americans throughout their lifetimes."

The first chapter, which I wrote, describes the major sources of *deliberate* education and learning in the United States, including the schools, various non-school organizations, and diverse sources of "self-directed" or "do-it-yourself" learning. It also comments on several important sources of *unintentional* learning. One conclusion of this chapter is that many more adults are presently learning through non-school sources than through schools or colleges.

The second chapter, written by Pat Cross, reviews and synthesizes the findings from about 30 state and national surveys of adult learning interest and participation. One of Cross's general conclusions, which may come as no great surprise, is that the entire adult education "system" in the nation is class-biased—that poorly educated populations are grossly under-represented.

The topic of the third chapter, written by Susan Powell, is state-level or state-agency activities, related t lifelong learning. The chapter overviews the major *types* of state activities, and it includes numerous specific illustrations of each.

The fourth chapter, by Terry Hartle and Mark Kutner of the Educational Policy Research Institute in Washington, D.C., deals with Federal Government initiatives in lifelong learning. One of their broad conclusions is that while there is substantial sympathy for lifelong learning as an educational philosophy, there will probably be little support for it if support means a new program requiring sizeable amounts of new money.

Lifelong learning innovations in local settings is the general topic of the fifth chapter, written by John Valley. After reviewing a number of local statistical studies, and a host of new programs conducted by a variety of organizations—school and non-school, Valley points in particular to the problems and prospects for effective *coordination* of local programs.

The last chapter, which resembles a set of appendices, is a guide to further information of potential use to planners. It consists of directories of interested organizations, statutory advisory councils, clearinghouses, and journals and newsletters; descriptions of ongoing research projects and services to institutions; and the text of several pieces of 1976 Federal legislation.

LIFELONG LEARNING: IMPORTANT NEXT STEPS

Occasionally in this paper I will refer to "lifelong learning concepts." By this I mean mainly two things: that education and learning are, properly, continuous throughout peoples' lifetimes, rather than terminal at some point (for example, at age 18 or 21); and that education and learning can be facilitated through a variety of organizations and individuals in the community—not just schools and colleges.

The following nine points, stated as imperatives, summarize what I believe are the important next steps for the lifelong learning movement.

(1) Lifelong learning concepts should become the basis for an intellectual reformulation of education in America. They should be the fundamental theoretical principles behind this country's educational and learning efforts.

This kind of reconceptualization has for some time been advocated by a number of European theorists, included several associated with the United Nations Educational, Scientific, and

Cultural Organization (UNESCO). To my knowledge, only a few Americans have been thinking along these lines; they include Lawrence Cremin, in particular, as well as Paul Miller, Norman Kurland, George Nolfi, and the authors of the Department of Health, Education, and Welfare's Lifelong Learning Project report.[2]

In his book *Public Education,*[3] Cremin posits "a new formulation": "The theory of education is the theory of the relation of various educative interactions and institutions to one another and to the society at large" (p. 24). In a chapter entitled "Toward an Ecology of Education," he counsels that we recognize "the multiplicity of individuals and institutions that educate—parents, peers, siblings, and friends, as well as families, churches, synagogues, libraries, museums, summer camps, benevolent societies, agricultural fairs, settlement houses, factories, radio stations, and television networks" (p. 29).

While Cremin's main thesis is that we need to think and plan comprehensively, in the sense of embracing all manner of agents that educate or otherwise facilitate learning, he is concerned also with the lifelong nature of learning. He stresses that "education must be looked at whole, across the entire life span, and in all the situations and institutions in which it occurs" (p. 59).

(2) Lifelong learning principles should be considered for use as the conceptual basis for organizing the projected new Federal department of education. Having suggested that lifelong learning be at the heart of a new understanding of education in America, I would also argue that this formulation, in turn, become the basis for a coherent national policy for education and learning. It also seems reasonable to suggest that this national policy inform the organizational framework of the new department.

How might we accomplish such a restructuring? One is reluctant to suggest *any* basis for organization, since any pyramid of agencies and bureaus will almost inevitably lead to a fragmented, rather than a unified concern for learners. It seems to me that grade level distinctions—elementary, secondary, postsecondary, for example—ought not to be the basic organizing principle. Maybe only general divisions are needed—such as student (financial) aid, instructional support, innovation/demonstration, and research/evaluation/dissemination.

Perhaps the greatest measure of inventiveness called for will be not so much in developing a substantive structure, but in devising ways for communication and coordination among diverse agencies or functions within the new department. This should make for better relations with states, and, eventually, better services to lifelong learners.

(3) We need to devise and experiment with organizational forms that enable *local or regional* authorities to engage in comprehensive planning and coordinated provision of learning services.

Since the actual work of facilitating education and learning will be done by people in local schools and colleges, museums, churches, and other community agencies, these organizations will have to decide to communicate and cooperate rather than compete; to work together to meet the range of learning needs in their particular area, rather than work separately on behalf of their own interests.

Representatives from all the providers of education—nursery through graduate school and outside of school—need to meet each other, talk together, and learn what each other's capabilities are. The next step might involve a cooperative analysis of learning needs in the community or region. Then there could be cooperative planning for meeting those needs, planning that would include deciding which organizations would provide which services. The actors would have to agree to abide by the plans, rather than try to manipulate the new arrangement to their own ends.

Unfortunately, there is little history of cooperation of this sort, at any level. The order of the day is competitive entrepreneurship. The inclination to cooperate is not likely to arise spontaneously. Legislative mandates will make for token and grudging efforts at best. Implementation of a mechanism of this sort, that will affect so many interests and established ways of doing things, is best accomplished gradually, from the bottom up, rather than precipitously, from the top down.

What would be needed for a cooperative effort, such as a metropolitan learning council, to become a reality? First, some good ideas about how the new authority—call it METRO—might operate; second, effective, sensitive leadership; third, sound legislation; and fourth, generous funding.

The last condition, generous funding, is particularly needed to, in effect, "buy" the coopera-

tion of certain key actors. For example, METRO could operate a region-wide educational brokerage service—a network of information and counseling units—that would bring in new students to all the cooperating institutions. Well-conceived and conducted needs analyses, as well as effective advertising on behalf of the entire learning system (both funded by METRO), could also be incentives for cooperation.

These are very preliminary thoughts on new local organizational strategies for facilitating lifelong learning. In my opinion, it is at the institutional and agency level—certainly below the state level—that the basic planning ought to take place, and we need some creative thinking about how this can be best accomplished.

(4) Governmental and other social agencies not directly involved in education also need to be included in community or regional educational planning. I have in mind agencies concerned with transportation, housing, employment, health, social welfare, and environmental protection. At present, the work of the schools and colleges tends to go on quite separate from other human services. The schools and colleges have probably wanted it this way; they've not wanted to get their hands dirty in city or county politics.

In the past two or three years there has been much *talk* about interrelations between education and work. And there is at least one current example where, through public policy—the federal Youth Employment and Demonstration Projects Act—secondary-school officials are cooperating with Comprehensive Employment Training Act (CETA) people and private employers to implement cooperative learn-and-work projects (which, by the way, call on the schools to award degree credit for the work experience).

There could also be useful connections with the other governmental agencies. Older people, especially, need convenient and safe transportation to learning centers. Public housing could be designed to utilize resources from area schools and colleges. And cooperation between public health agencies and the schools could have a preventive health payoff for people of all ages.

The general point is that the potential for facilitating lifelong learning for everyone in the community would be greater if the various sectors of public policy would act in concert. (I recognize that the suggestion that education be linked more closely with the other social services may be an argument for *not* creating a separate department of education.)

(5) We must devise education and learning programs that will attract and hold poorly educated people.

Some educators would say that we have no right to insist that people who are now reluctant learners, or non-learners, become learners. My argument is that we now have a situation where *all* taxpayers are supporting a post-compulsory educational apparatus that by and large serves the well-educated, affluent classes. Politically, this is probably an impossible situation. If we want political support for lifelong learning, we either have to figure out ways to serve the underclasses--to somehow arrange things so that non-learners want to become learners, or else give up the whole idea. Not many legislatures will support major new lifelong learning initiatives that mainly engage the leisure classes.

Attracting new learners is going to require more than merely improving access to familiar educational forms—even with new financial-aid incentives. Pat Cross writes, "The same things that led to relatively early school-leaving undoubtedly contribute to lack of interest in returning . . . (such people will not be) especially eager to expose themselves to the threat of further failure."[4] Somehow, learning experiences that are pleasant, not threatening, need to be invented for reluctant learners, and they must be seen by the learner as worthwhile.

(6) The commercial electronic mass media need to be reformed. Anyone concerned for the best possible development of individuals in this country should want to join efforts to reform or regulate commercial television and radio. According to one report, "The television set in the average American home is now turned on more than six hours a day."[5] Imagine what could be done with all that time! Since we now seem hooked on television, and teenagers on radio, the palpable task is to work to raise the quality of programming on the commercial media. It is difficult to conceive of a nation of lifelong learners so long as commerical television and radio have the powerful and generally non-intellectual impact they presently have.

(7) We need more and better research on learners' preferences and needs. We need large-

scale, well-funded projects that can be potentially conclusive, rather than small studies, using small samples, that lead only to limited or tentative conclusions.

A number of individuals and groups have been working on developing research agenda for adult learning. Alan Knox at the University of Illinois last fall published a comprehensive outline of needed studies,[6] and the National Institute of Education recently released a "Federal Research and Development Agenda in Adult Education."[7] Norman Kurland and his colleagues have completed a statement on research needs that will be published shortly by The College Board's "Learning Society" project.[8]

Everyone interested in lifelong or adult learning probably has a research agenda or set of priorities. My three are as follows:

- We must make a major and continuing effort to study the processes by which adults can best learn basic literacy skills—to read, write, and compute. For people unable to read and write reasonably well, all the prospects for lifelong learning and learning societies will be a sorry hoax.

- We need to document the benefits of adult learning, to individuals of all socio-economic ranks, and to the society in general—to the public weal. This research will be enormously complicated, but it is necessary. Legislatures are not likely to commit major sums to comprehensive lifelong learning programs without some sort of evidence that it won't be money wasted on ineffective or unnecessary programs—or money used by the colleges to maintain funding levels and faculty positions).

- My third research priority is to find out how to hook the turned-off non-learner. How do we recruit people into the nation's learning force, and then make their experience in the force rewarding, even addictive?

(8) We need vastly improved information clearinghouse services in this country. One has the impression that innovative programs for adult and lifelong learners are proliferating—yet we have no systematic way of knowing about them.

The clearinghouse (or network of clearinghouses) should provide results from recent research and summaries of theoretical studies, as well as descriptions of successful innovations. Clearinghouse staff should work closely with both the generators and the users of information, including federal and state policy-makers, and with institutional planners. The clearinghouse should have an international perspective, since thus far there is much more lifelong-oriented educational activity abroad than in the United States.

Clearinghouse ADELL—the Adult Education and Lifelong Learning Clearinghouse—is woefully underfunded. Funding of dissemination work is a highly appropriate activity for the federal government; clearinghouses such as ADELL merit consideration for a portion of the $5 million budgeted for lifelong learning next year.

(9) My last point is that we—the growing band of lifelong learning advocates—continually need to re-examine what we are doing and advocating. The rapid expansion of new programs for adults that are offered by colleges and other organizations raises some fundamental questions. Do our working assumptions tend to be elitist? Are we really serving the people, or just well-educated people? Is our first priority to serve individuals, or to serve institutions? Does it really make sense to try to work with all the human services in the community, or is this just too impractical?

The times have a way of changing; we need both critics of our present policies and visionaries to point us toward new ways of facilitating learning.

SUMMARY

To summarize, I described our year-long Exxon project and sketched on the basis of the thinking that went into the study, nine "important next steps" needed to move lifelong learning from rhetoric toward reality. These sometimes immodest suggestions were the following:

(1) Reconceptualize American education in terms of lifelong learning concepts;

(2) Use lifelong learning concepts as the philosophic basis in organizing the projected new federal Department of Education;

(3) Devise new mechanisms at the local or regional level for planning and coordinated learn-

ing services;

(4) Include non-educational human service agencies in the (local) planning and delivery of educational services;

(5) Devise educational and learning programs that will attract and hold poorly-educated people;

(6) Reform the commercial electronic mass media;

(7) Conduct more and better research—particularly on literacy training, benefits from adult learning, and methods for attracting "reluctant learners";

(8) Improve information clearinghouse services for planners of lifelong learning programs;

(9) Continually re-examine lifelong learning policies and practices.

Utopian? I suppose so. Impossible? By no means.

FOOTNOTES

[1]Authors include Richard E. Peterson, K. Patricia Cross, Terry W. Hartle, Mark A. Kutner, Susan A. Powell, and John R. Valley; to be published in the winter of 1978-1979 by Jossey-Bass Publishers.

[2]Lifelong Learning Project, Department of Health, Education, and Welfare. *Lifelong Learning and Public Policy.* Washington, D.C.: Author, 1978.

[3]Cremin, Lawrence A. *Public Education.* New York: Basic Books, 1976.

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[8]The Advisory Panel on Research Needs During Adulthood of Future Directions for a Learning Society, The College Board, and The Coalition of Postsecondary Interests. *Lifelong Learning During Adulthood: An Agenda for Research.* New York: The College Board, 1978.

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